


**Appointment Change Action – Transfer**

- Purpose** Use this procedure to process an appointment change for an employee who is transferring to a position in their current agency, sub-agency, or in another agency.
- Trigger** Perform this procedure when an employee has been appointed to another position.
- Prerequisites**
- The employee must be active in HRMS.
  - There must be a position to appoint the employee into.
- End User Roles** In order to perform this transaction you must be assigned the following role:  
Personnel Administration Processor

Change History	
Date	Change Description
7/23/2009	Procedure created in new template. Updates to the Helpful Hints section, screenshots, Payroll, and Benefits Processor steps.
8/6/2009	Steps 38-39, 50-51 have been updated to reflect the type of warning message that displays during the 'Execute info group' function.
9/8/2009	Step 16 has been updated to clarify the Position Vacancy process for gaining and losing agencies. See HRMS Communication 9/8/09.
2/3/2012	Updated <i>Personnel Actions</i> selection screenshots
12/27/2012	Added to step 16. Provided link to user procedure <i>Position-Maintain Vacancy</i>
03/25/23013	Added step 24 on how to <i>Create Communication (0150)</i> to create an employee's email address into the dynamic action.







**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions




**Transaction Code** PA40

<b>Helpful Hints</b>	<p><b>If the employee is transferring to another agency, the gaining agency will perform this procedure and contact the losing agency and inform them of the employee's transfer.</b></p> <p>The <b>losing agency</b> will need to enter/change any remaining master data prior to the <b>gaining agency</b> performing the appointment change action.</p> <p>Example: leave to enter or delete in CATS, garnishments, or anything pending master data for the employee.</p> <div style="text-align: center;">  <p><b><u>IMPORTANT NOTE REGARDING EMPLOYEES ENROLLED IN HEALTH INSURANCE:</u></b> When a transfer occurs at any time prior to the end of the month, the <b>losing</b> agency is responsible for paying the state share for the entire month. The <b>gaining</b> agency will not be billed for state share until the month following the transfer date.</p> </div>
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	<p>In PAY1, <b>losing agency</b> must enter <b>401</b> (transfer out code) in the TRANSFER REASON field, and the last day of the month (the losing agency is responsible for the insurance premiums for the entire month) in the TRANSFER EFF DATE field. Press PF10 to update.</p> <p>In PAY1, <b>gaining agency</b> must enter the new HOME AGENCY/SUB-AGENCY (this requires that you move the cursor to the home agency field), enter <b>201</b> (transfer in code) in the TRANSFER REASON field and the transfer-in date (should always be the first day of the month in which the new agency is responsible for the insurance premiums) in the TRANSFER EFF DATE field. Press F10 to update. This will set the home agency lock to the new agency. <u>Do not update any other fields on this screen until after the transfer transaction.</u> Additional changes to the A.41 screen fields will require a separate transaction.</p> <p>Contact HCA for more instruction by phone: 360 923-2847 or by email: helpdesk@hca.wa.gov .</p> <p>If the employee is transferring in their current agency perform this procedure by your assigned role.</p> <p>This procedure may require hand-offs to other roles (payroll processor and /or benefits processor) depending on the structure of your agency and your role at your agency.</p> <p>If a hand-off is made to another role, it is critical the transaction code <b>PA40</b> is used and the “<i>execute into infogroup</i>” process is used. This is explained further in this procedure. Using <b>PA40</b> will ensure that all required infotypes are completed.</p> <p>Do not use transaction code <b>PA30</b> to complete portions of the appointment change action.</p>
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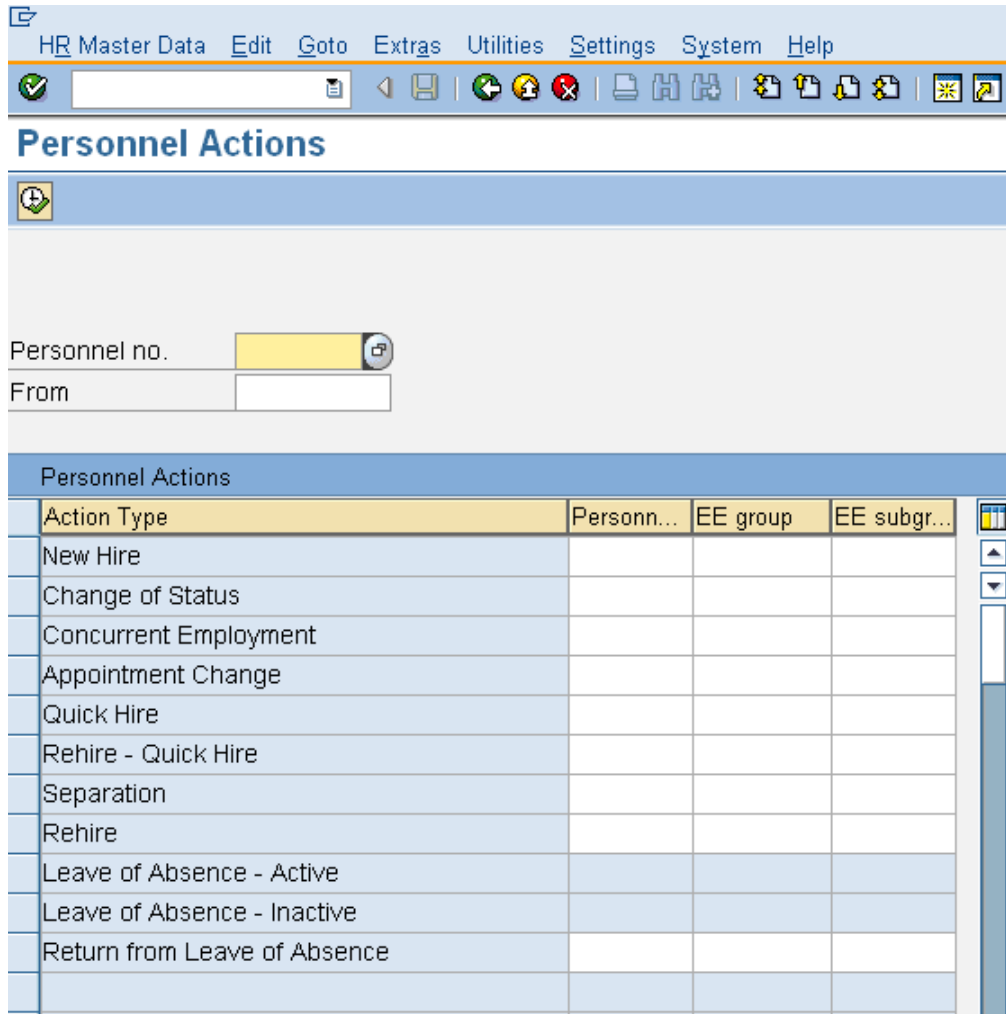
The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:


Message Type	Description
<b>Error</b> 	<p><b>Example:</b>  Make an entry in all required fields.</p> <p><b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.</p>
<b>Warning</b> 	<p><b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.</p> <p><b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.</p>

Message Type	Description
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.

**Procedure**

1. Start the transaction using the above menu path or transaction code **PA40**.



Personnel no.  

From

Action Type	Personn...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			


2. Complete the following fields:


R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. <b>Example:</b> 40000312

3. Perform one of the following:


IF	Go To
You are the Personnel Administration Processor	Step 4
You are the Payroll Processor	Step 33
You are the Benefits Processor	Step 45


4. Complete the following fields:

From	R	<p>The effective date of the action.</p>  Only enter the <i>From</i> date if you are the Personnel Administration Processor initiating the appointment change action. <b>Example:</b> 07/16/2009
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5. Click  (Enter) to validate the information.

HR Master Data Edit Goto Extras Utilities Settings System Help

 **Personnel Actions**



Personnel no.


Name

PersArea  Dept of Labor & Industries EEGroup  Permanent

PSubarea  IBEW Elec Insp EESubgroup  M-OT Elig>40hrs/wk Status

From

Personnel Actions			
Action Type	Personn...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
<b>Appointment Change</b>			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

6. Click the box to the left of  to select.
7. Click  (Execute) to execute the action.

Infotype Edit Goto Extras System Help

**Copy Actions (0000)**

Execute info group Change info group

Pers.No. 40000312  
 Name OWEN ROBERT  
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 07/16/2009 to 12/31/9999

**Personnel action**  
 Action Type U3 Appointment Change  
 Reason for Action 01 Promotion



**Status**  
 Employment 3 Active


**Organizational assignment**  
 Position 71000013 FISCAL TECHNICIAN 1  
 Personnel area 3500 Sup of Pub Instruction  
 Employee group 0 Permanent  
 Employee subgroup 06 M-OT Elig>40hrs/wk


**Additional actions**

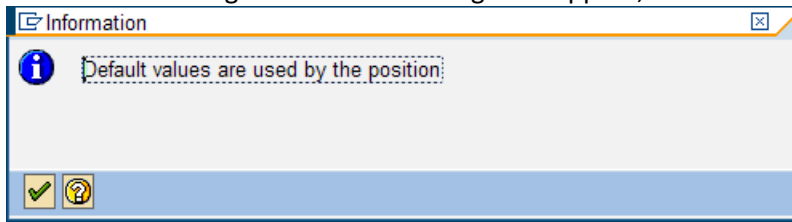
Start Date	Act.	Action Type	ActR	Reason for action
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8. Complete the following fields:


R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason for Action	R	It stores the reason that an action has been performed.  Click the  (Matchcode) to open the selection list. <b>Example:</b> 01 Promotion
Position	R	This is a system-assigned number given to a particular position. Each unique position will have its own position number. <b>Example:</b> 71000013

9. Click  (Enter) to validate the information.

 The following Information Message will appear,



10. Click  (Copy) to accept.

11. Click  (Enter) to validate the information.

12. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Copy Organizational Assignment (0001)**

Org Structure

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2009 to 12/31/9999

**Enterprise structure**

CoCode WA01 STATE OF WASHINGTON

Pers.area 3500 Sup of Pub Instruction Subarea 0001 Non Represented

Cost Ctr 3500000000 DEFAULT AGENCY 35 Bus. Area 3500 Supt. of Public Instruction

Fund

**Personnel structure**

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elig>40hrs/wk Contract 03 Trial Service

**Organizational plan**

Percentage 100.00 Assignment

Position 71000013 ACT13

Job key 50000521 FISCAL TECHNICIAN 1

Exempt N 148L

Org. Unit 31000028 FISCAL TECHNICIAN 1

650

EMPLOYEE HIRING ORC

Org.key




**Administrator**

PersAdmin


Time


PayrAdmin

13. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract	R	<p>The status of the appointment.</p> <p> Click  (Dropdown) to view the selection list.</p> <p><b>Example:</b> 03 Trial Service.</p>
Org. Key	O	<p>The pay distribution location.</p> <p> This field is used at the discretion of the agency.</p> <p><b>Example:</b> 1RAMAD</p>

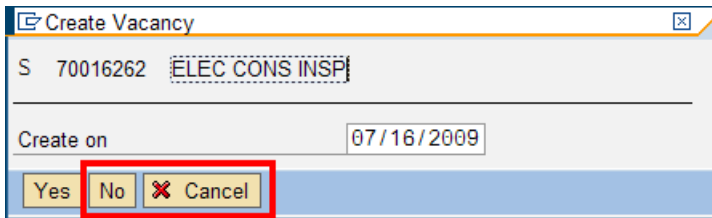


Time	O	<p>The time data administrator is responsible for the employees assigned to him or her.</p> <p> This field is used at the discretion of the agency.</p> <p><b>Example:</b> DA</p>
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14. Click  (Enter) to validate the information.

15. Click  (Save) to save.

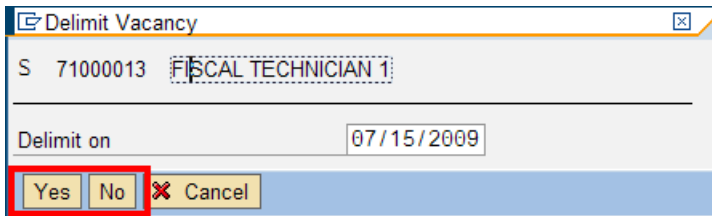
16. You will receive the following messages:




As the gaining agency, you cannot create the vacancy for the losing agency's position. As a courtesy, please contact the losing agency to inform them of the vacancy. Click 'No' or 'Cancel'.




The losing agency should manually update their [position's vacancy](#) infotype.



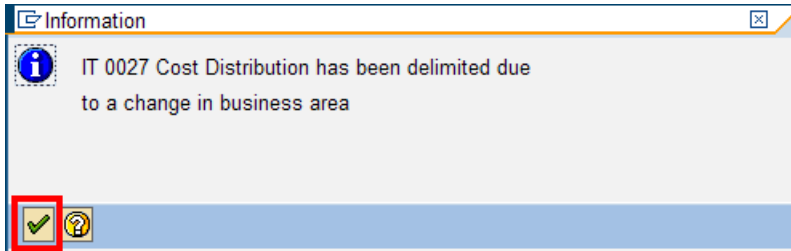
Select the appropriate option for your personnel area's position. Click 'Yes' or 'No'.



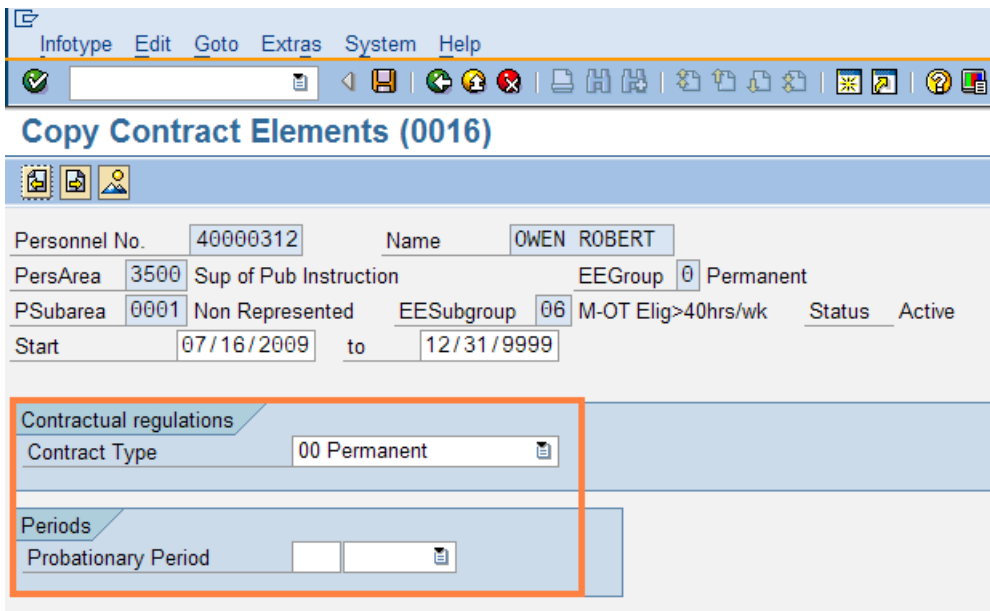
This step is important in order to maintain accurate vacancy reporting in HRMS and Business Intelligence (BI).

17.  The Delimit Cost Distribution will only come up if the *Cost Distribution* Infotype (00027) has been created by the losing agency.

If this does not come up during the action skip to Step 18.






Click  (Continue) to continue.



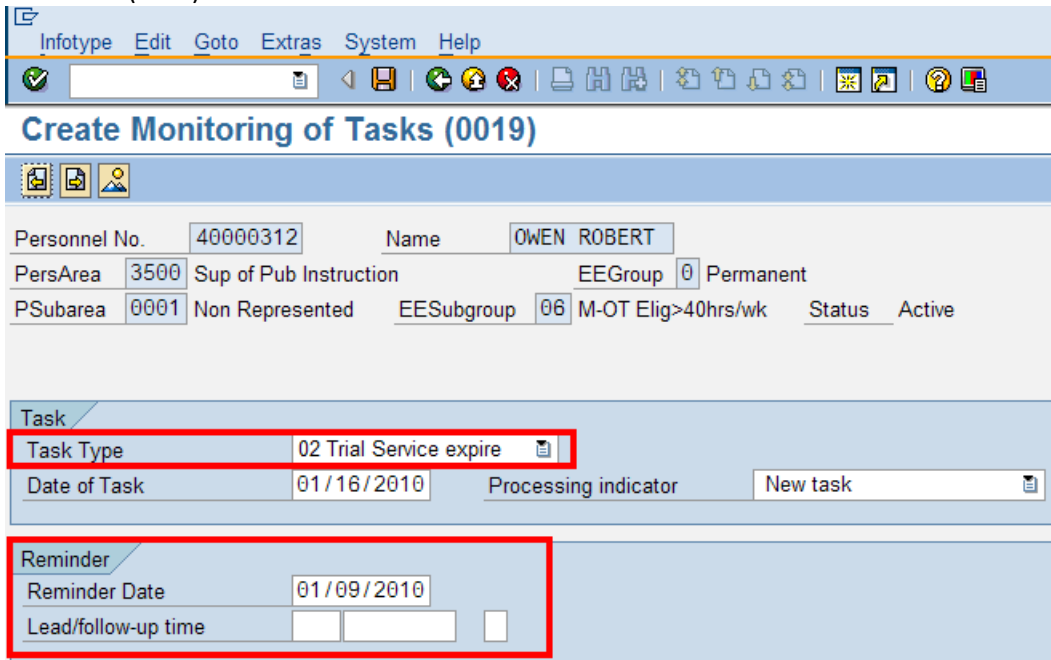
18. Complete the following fields:


R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract type	C	It defines an employee's State status as either permanent or non-permanent. <b>Example:</b> 00 Permanent.

Probationary period	O	<p>This denotes how long an employee is in probation status.</p> <p> If the probationary period is not entered, the next infotype (<i>Monitoring of Tasks</i> (0019)) will not appear.</p> <p> The <b>Probationary period</b> field is also used for the Trial Service period. Verify that the value matches the Trial Service period.</p> <p><b>Example:</b> 6 Months</p>
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19. Click  (Enter) to validate the information.


20. Click  (Save) to save.




 The Monitoring of Tasks infotype may not appear based on the chosen contract type. If the infotype does not appear, skip to the Step 24.

21. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Task Type	R	<p>A task type is a relevant task that an HRMS user would be expected to perform.</p> <p> Click  (Dropdown) to view the selection list.</p> <p><b>Example:</b> 02 – Trial Service expire</p>

Reminder Date	O	This is the date on which the system will remind a user (via report) that a specific period is expiring or a record needs to be updated. <b>Example:</b> 01/09/2010
Lead/follow-up time	O	This is the amount of time to be notified in advance or after an event has occurred.  When the infotype is validated, this field will be converted into the <i>Reminder Date</i> field based on the <i>Date of Task</i> . <b>Example:</b> 1 Weeks

22. Click  (Enter) to validate the information.

23. Click  (Save) to save.

**Create Communication (0105)**

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp ESubgroup 06 M-OT Elig>40hrs/wk Status Active


Start 03/01/2013 to 12/31/9999

**Communication**

Type 0010 E-mail

ID/number ☒

24. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
ID/NUMBER	R	Enter the employee's work email address.   <b>If you do not know the email address</b> at the time of the new hire, click the next record button to move to the next infotype.

		<ul style="list-style-type: none"> <li>Enter the email address using Maintain HR Master Data PA30 as soon as you obtain it.</li> </ul> <p><b>Example:</b> RKOWN@LNI.WA.GOV</p>
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**Create Communication (0105)**

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent


PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 03/01/2013 to 12/31/9999

**Communication**

Type 0010 E-mail

ID/number RKOWN@LNI.WA.GOV

25. Click  (Etner) to validate.

26. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Planned Working Time (0007)**

Work schedule

Personnel No. 40000312 Name OWEN ROBERT

PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2009 To 12/31/9999

**Work schedule rule**

Work schedule rule FULL

Time Mgmt status 9 9 - Time evaluation of planned times

☐ Part-time employee Additional time ID

**Working time**

Employment percent 100.00

Daily working hours

Weekly working hours 0.00

Monthly working hrs 0.00

Annual working hours 0.00

Weekly workdays

☐ Dyn. daily work schedule

Min. Max.

Min. Max.


Min. Max.

Min. Max.

27. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday. <b>Example:</b> FULL
Time Mgmt status	R	This is part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. 1-Time Evaluation of actual times - Use for Hourly employees 9-Time Evaluation of planned times - Use for Monthly employees
Additional time ID	R	The indicator on how employee leave will accrue Enter: <ul style="list-style-type: none"> <li>00 for full normal leave accrual (will default if to normal if field is left blank).</li> <li>01 for NO leave accrual</li> <li>02 for sick leave accrual only</li> </ul>
Employment	R	The amount of time that an employee works per week in a

percent		particular position and is described in terms of a percentage. <b>Example:</b> 100.00
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28. Click  (Enter) to validate the information.

29. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Copy Date Specifications (0041)**

Personnel No. 40000312 Name OWEN ROBERT

PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active


Start 07/16/2009 to 12/31/9999

Date type	Date	Date type	Date
01 Anniversary Date	04/20/1995	02 Appointment Date	07/16/2009
03 Original Hire Date	07/16/2009	04 Prior PID	05/01/1999
05 Seniority Date	04/16/1997	07 Unbroken Svc. Date	04/16/1997
18 Prsnl HolidayElgblty	06/16/2006		




In HRMS, there are a limited number of date types to enter into Date Specifications. You are limited to 12 date types for each record.

30. Review the employee's Date Types and Dates, and make the necessary updates.

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Date type: Original Hire Date (03)	C	The date the employee starts at an agency.  If the Appointment Change is to a new agency this date should reflect the date the employee went to the new agency. <b>Example:</b> 03 (Original Hire Date) – XX/XX/XXXX
Date Type: Appointment Date	R	The effective date of the appointment. <b>Example:</b> 02 (Appointment Date) – XX/XX/XXXX



If necessary, make changes, additions, or deletions to the date specifications.

31. Click  (Enter) to validate the information.

32. Click  (Save) to save.

Infotype Edit Goto Wage types Extras System Help

**Create Basic Pay (0008)**

Salary amount Payments and deductions

Personnel No. 40000312 Name OWEN ROBERT

PersArea 3500 Sup of Pub Instruction EEGGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2009 to 12/31/9999



Subtype 0 Basic contract

**Pay scale**






Reason	20	Appointment Change	Capacity Util. Level	100.00
PS type	00	Non-Represented	Work hours/period	87.00 Semi-monthly
PS Area	01	Standard Progression	Next increase	07/16/2010
PS group	29	Level K	Annual salary	31,176.00 USD


Wa	Wage Type Long Text	O	Amount	Curre	In	A	Number/Unit	Unit
1003	Pay Period Salary		1,299.00	USD	I	<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

33. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason	R	<p>The reason for the change in pay.</p> <p> If you do not know the number for the Reason, you can click the  (Matchcode) to open the selection list.</p> <p><b>Example:</b> 20 – Appointment Change</p>




Level	C	<p>This defines the step within a range for compensation.</p> <p> Level A will default into the field. The PS Level is used to reflect the salary for a General Government employee and defines this as Indirectly Valuated. You may need to change the level.</p> <p><b>Example:</b> K</p>
Next Increase	C	<p>This is the date of the next scheduled increase in the employee's pay. This is also known as the periodic increment date.</p> <p> If this field is blank the employee will not receive their pay increment.</p> <p><b>Example:</b> 07/16/2010</p>
Annual Salary	C	<p>This is the dollar amount that the employee receives as pay per year.</p> <p> If the employee is WMS, Higher Ed Exempt, Students, Non Classified Elected Official, Non Classified Exempt Management Service, Non Classified Non Pay Scale, Non Classified Board Members you must enter the annual salary in this field. Entering the salary defines this person as Directly valued.</p> <p><b>Example:</b> 31,176.00</p> <p>(The employee in this example is General Government and their salary will be populated based upon the PS Group/Level selected)</p>
Wage Type	C	<p>It separates amounts and time units for various business processes.</p> <p> The wage type of 1003 should default in if the employee is monthly. Wage type 1001 should default in if the employee is hourly. Enter the wage type if the field is blank.</p> <p> You can also enter wage types for Shift Difference and Assignment Pay.</p> <p><b>Example:</b> 1003 Pay Period Salary</p>

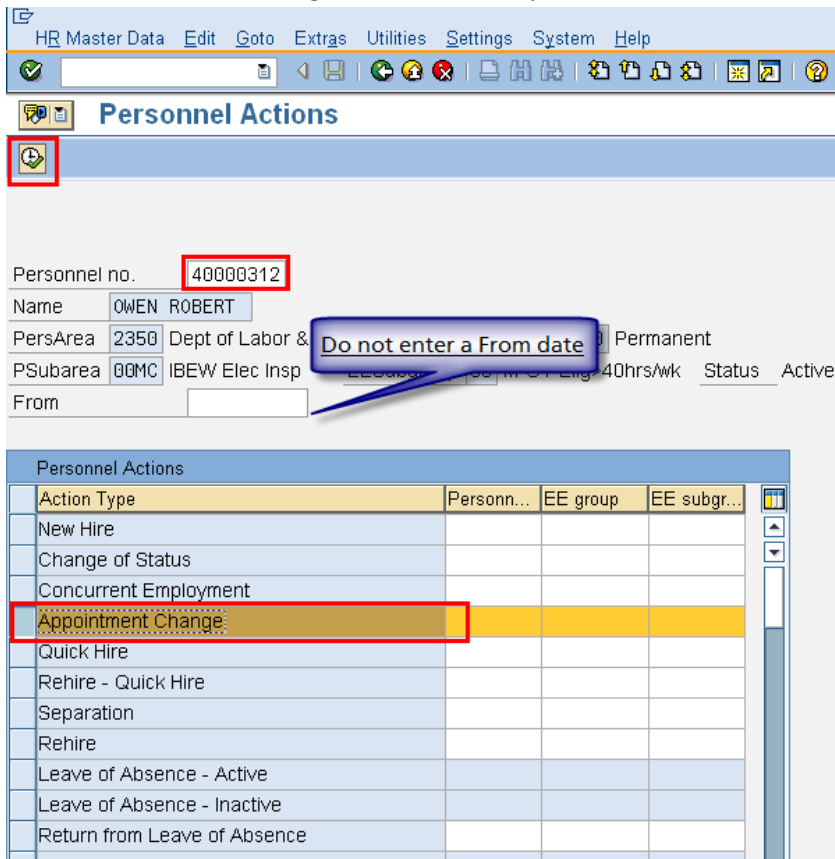
34. Click  (Enter) to validate the information.

35. Click  (Save) to save.



For the **Personnel Administration Processor**, this will mark the end of the Appointment Change action. After saving, click  to exit the action and transfer the employee's information packet to the **Payroll Processor** who will complete the action.

36. Start the transaction using the above menu path or transaction code **PA40**.





Action Type	Personn...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			




















**Payroll Processor** –Do not put a “From” date in the field prior to executing the transaction.

37. Complete the following fields:



R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number.  <b>Example:</b> 40000312

38. Click  (Enter) to validate the information.
39. Click  (Execute) to execute a process or action.

Infotype Edit Goto Extras System Help

### Copy Actions (0000)

 **Execute info group**  Change info group





Pers.No. 40000312  
 Name OWEN ROBERT  
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 07/16/2009 to 12/31/9999

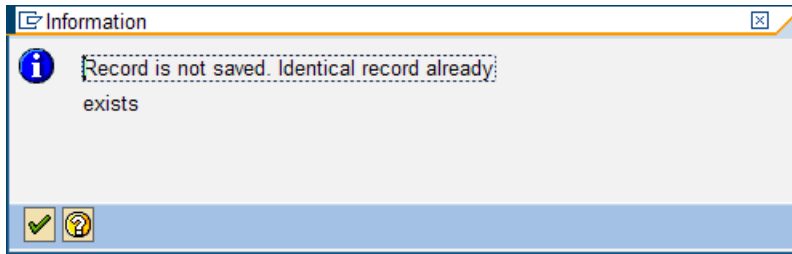
**Personnel action**  
 Action Type U3 Appointment Change  
 Reason for Action 01 Promotion




**Status**  
 Employment 3 Active

**Organizational assignment**  
 Position 70016262 ELEC CONS INSP  
 Personnel area 2350 Dept of Labor & Industries  
 Employee group 0 Permanent  
 Employee subgroup 06 M-OT Elig>40hrs/wk

**Additional actions**


40. Click  **Execute info group**.
41. The follow messages will appear. Click  (Save) to continue.
-  Record stored only in Additional Actions infotype. Save
42. An Information window will appear. Click  (Continue) to continue.




43. Click  (Next Record) until you reach Subtypes for infotype Education, click  (Close) to bypass this infotype.
44. Continue to click  (Next Record) until you reach *Create Add. Withh. Info. US* (0234) infotype.

 A screenshot of the 'Copy Add. Withh. Info. US (0234)' infotype form. The form has a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. The main data area contains fields for Personnel No. (40000312), Name (OWEN ROBERT), PersArea (3500), Sup of Pub Instruction, EEGGroup (0), Permanent, PSubarea (0001), Non Represented, EESubgroup (06), M-OT Elig>40hrs/wk, and Status (Active). The 'Start' date (08/10/2009) and 'to' date (12/31/9999) are highlighted with a red box. Below this is the 'Overrides' section with fields for Tax authority (FED), Federal, Tax level (A), Federal, Supplemental method, Aggregation with Pay Periods Method, Override amount, Override percentage, and a checkbox for 'No Tax'. The 'Empl.override group' (0138) and '2350-5307 EMP N.O.C.' are highlighted with a red box. At the bottom is the 'Common Paymaster' section with a checkbox for 'Common Paymaster'.

45. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	<p>The start date for the payment/deduction.</p> <p> Start date should be the first paydate the employee is with the gaining agency.</p>

		<b>Example:</b> 08/10/2009
Empl. override group	R	This is the Worker's Compensation code that an employee holds for a particular job. <b>Example:</b> 0079


46. Click  (Enter) to validate the information

47. Click  (Save) to save.



For the **Payroll Processor**, this will mark the end of the Appointment Change action.

**Payroll Processor** if the employee has recurring payments /deductions, go to **PA30** and follow the procedures Create a Recurring Payment or Create Recurring Deduction.

After saving, click  to exit the action and transfer the employee's information packet to the **Benefits Processor** who will complete the action.

48. Start the transaction using the above menu path or transaction code **PA40**.

HR Master Data Edit Goto Extras Utilities Settings System Help

**Personnel Actions**

Personnel no. **40000312**

Name OWEN ROBERT

PersArea 2350 Dept of Labor & PersPermanent

PSubarea 000MC IBEW Elec Insp 40hrs/wk Status Active

From

**Do not enter a From date**


Action Type	Personn...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
<b>Appointment Change</b>			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			




**Benefits Processor** –Do not put a “From” date in the field prior to executing the transaction.

49. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee’s unique identifying number. <b>Example:</b> 40000312

50. Click  (Enter) to validate the information.

51. Click  (Execute) to execute a process or action.

Infotype Edit Goto Extras System Help

**Copy Actions (0000)**

Execute info group Change info group


Pers.No. 40000312  
 Name OWEN ROBERT  
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 07/16/2009 to 12/31/9999

**Personnel action**  
 Action Type U3 Appointment Change  
 Reason for Action 01 Promotion


**Status**  
 Employment 3 Active

**Organizational assignment**  
 Position 70016262 ELEC CONS INSP  
 Personnel area 2350 Dept of Labor & Industries  
 Employee group 0 Permanent  
 Employee subgroup 06 M-OT Elig>40hrs/wk

**Additional actions**


52. Click  Execute info group.



53. The follow messages will appear. Click  (Save) to continue.



 Record stored only in Additional Actions infotype. Save


54. An Information window will appear. Click  (Continue) to continue.

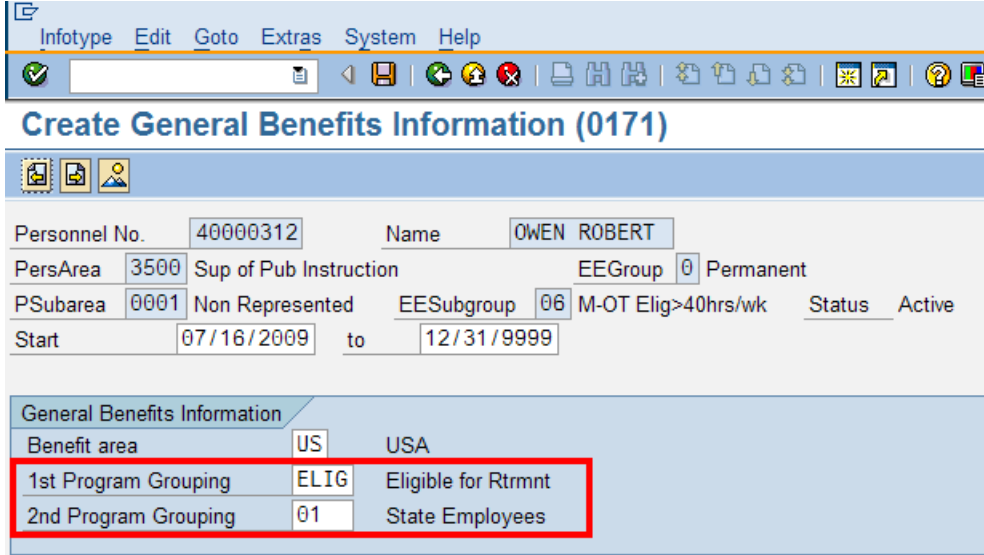
Information

 Record is not saved. Identical record already exists

55. Click  (Next Record) until you reach Subtypes for infotype Education, click  (Close) to bypass this infotype.

56. Continue to click  (Next Record) until you reach Create General Benefits Information (0171).



**Create General Benefits Information (0171)**

Personnel No. 40000312 Name OWEN ROBERT

PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2009 to 12/31/9999



**General Benefits Information**

Benefit area US USA

1st Program Grouping ELIG Eligible for Rtmnt


2nd Program Grouping 01 State Employees


57. Complete the following fields:

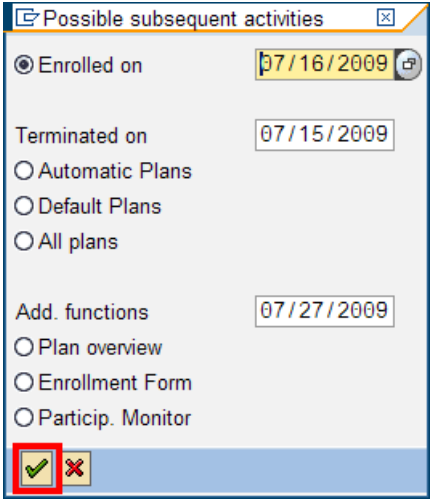
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
1 <sup>st</sup> Program Grouping	R	<p>This is used to determine an employee's retirement plan eligibility.</p> <p> The <b>1<sup>st</sup> Program Grouping</b> defaults in as eligible. To verify that the position is eligible use transaction code <b>PO13D</b>, click the gray box to the left of <i>Acct Assignment Features</i> infotype. If there is an X in the box next to Retirement Eligible field, then the position is retirement eligible. If the box is blank, the position is not retirement eligible.</p> <p><b>Example:</b> ELIG – Eligible for Rtmnt</p>
2 <sup>nd</sup> Program Grouping	R	<p>This defines the employee's job type and employer.</p> <p> The value in the <b>2<sup>nd</sup> Program Grouping</b> field defaults from personnel area.</p> <p>You will have to change the <b>2<sup>nd</sup> Program Grouping</b> field if:</p> <ul style="list-style-type: none"> <li>An employee chooses a different plan.</li> <li>The employee type defaulted to a code not consistent with the System/Plan set up at hiring time.</li> <li>An employee changes positions and wants to continue</li> </ul>



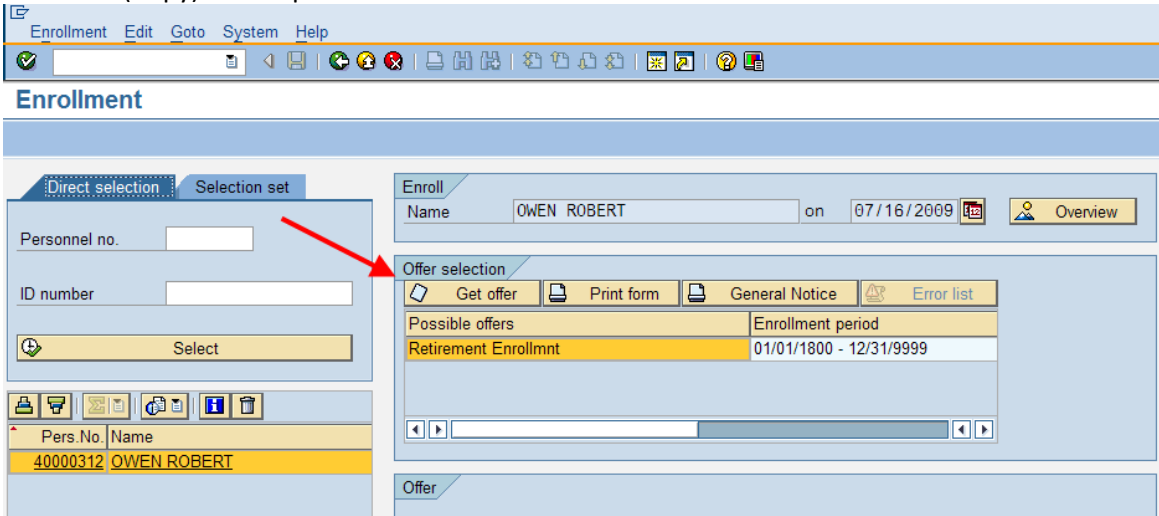
		<p>contributing to the System/Plan from his previous position rather than the one that defaults with the new position.</p> <p>For a list of valid type codes for each retirement system, see <a href="#">The Employer Handbook - Type Codes</a></p> <p><b>Example:</b> 01 (State Employee)</p>
--	--	--

58. Click  (Enter) to validate the information.

59. Click  (Save) to save.



60. Click  (Copy) to accept.



61. Click  Get offer .

Enrollment Edit Goto System Help

**Enrollment**

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name

40000312 OWEN ROBERT

Enroll

Name OWEN ROBERT on 07/16/2009 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers Enrollment period

Retirement Enrollmnt 01/01/1800 - 12/31/9999

Retirement Enrollmnt

Enroll Costs Undo selection Error List

Plan	Status	Validity period	Activity
401(a)			
PERS 2	■	07/16/2009 - 12/31/9999	
PERS 3 - Option 0		07/16/2009 - 12/31/9999	
PERS 3 - Rate A - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate A - WSIB		07/16/2009 - 12/31/9999	
PERS 3 - Rate B - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate B - WSIB		07/16/2009 - 12/31/9999	
PERS 3 - Rate C - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate C - WSIB		07/16/2009 - 12/31/9999	
PERS 3 - Rate D - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate D - WSIB		07/16/2009 - 12/31/9999	
PERS 3 - Rate E - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate E - WSIB		07/16/2009 - 12/31/9999	
PERS 3 - Rate F - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate F - WSIB		07/16/2009 - 12/31/9999	



For a Plan 3 employee transferring between employers (business areas), choose the appropriate plan (PERS, TRS, or SERS0 with the rate option of 0 (zero) to begin the 90-day choice period. This will place the employee on the 70-day/90-day default report.

**Maintain Savings Plan**

Pers.No. 40000312 OWEN ROBERT  
 Plan PERS 2  
 Start 07/16/2009 - 12/31/9999

☐ Stop participation in period

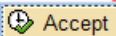

**Contribution regular**

**Pre-tax contribution Semi-monthly**




Amount 0.00 USD ☐ Pre-Tax Rollove  
**Percentage 3.89**  
 Units 0 X 0.00 USD

**Post-tax contribution Semi-monthly**

Amount 0.00 USD ☐ Start Pst-Tax I  
 Percentage 0.00  
 Units 0 X 0.00 USD

62. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Percentage	R	<p>This is a field used to store a percentage amount for the retirement deduction.</p> <p> <b>Do not leave the percentage field blank or HRMS will not take any deductions for retirement.</b></p> <p> If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an  Error message in the status bar telling you what the correct contribution percentage is for the selected plan.</p> <p><b>Example: 3.89</b></p>

63. Click  **Accept** .

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name

40000312 OWEN ROBERT

Enroll

Name OWEN ROBERT on 07/16/2009 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers Enrollment period

Retirement Enrollmnt 01/01/1800 - 12/31/9999

Retirement Enrollmnt

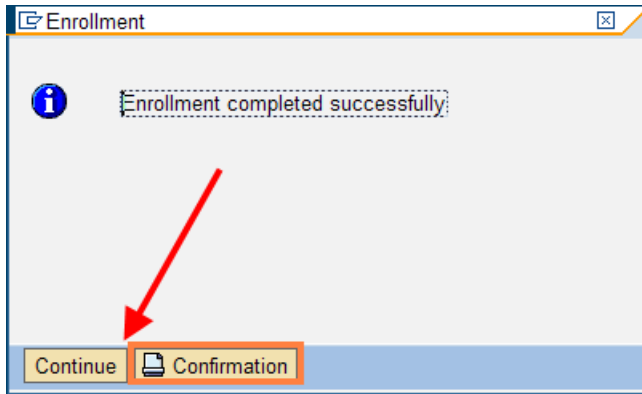
Enroll Costs Undo selection Error List

Plan	Status	Validity period	Activity
401(a)			
PERS 2	■	07/16/2009 - 12/31/9999	✓
PERS 3 - Option 0		07/16/2009 - 12/31/9999	
PERS 3 - Rate A - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate A - WSIB		07/16/2009 - 12/31/9999	
PERS 3 - Rate B - Self		07/16/2009 - 12/31/9999	
PERS 3 - Rate B - WSIB		07/16/2009 - 12/31/9999	
PERS 3 - Rate C - Self		07/16/2009 - 12/31/9999	

64. Click  **Enroll**

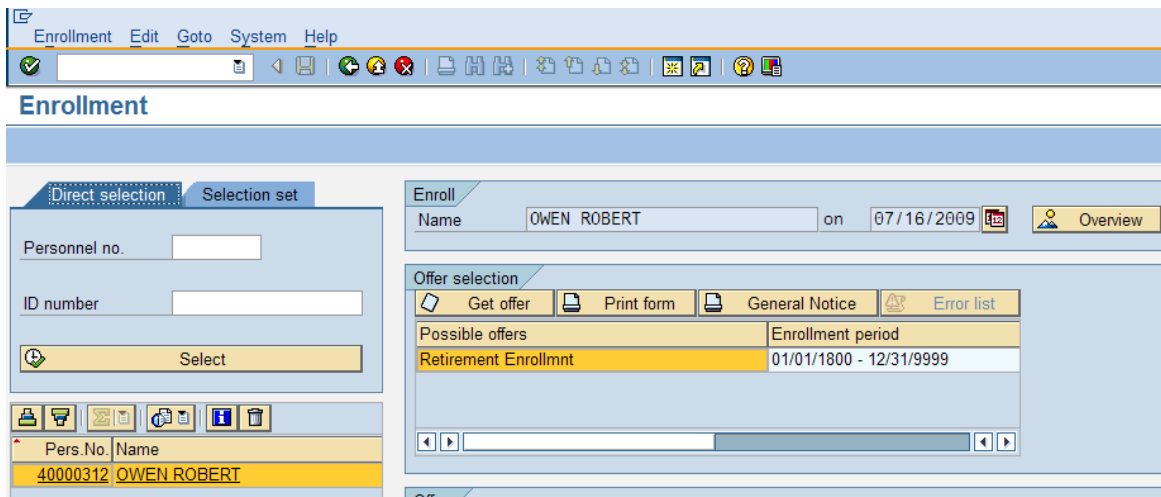
A screenshot of a software window titled "Confirmation of Selected Actions". The window has a blue header bar. Below it is a section labeled "List of Plans" which contains a table with four columns: Activity, Plan, From, and To. The first row shows "Change" under Activity, "PERS 2" under Plan, "07/16/2009" under From, and "12/31/9999" under To. There are several empty rows below this one. At the bottom left, there are two buttons: "Enroll" with a green circular arrow icon and "Cancel" with a red X icon. A red arrow points from the bottom right towards the "Enroll" button. On the far right side of the window, there are vertical scroll bars and navigation arrows.

65. Click  Enroll



The *Confirmation* button is not configured for use by the State of Washington at this time. However, agencies may use this as a confirmation of enrollment.

66. Click **Continue** to continue or click **Confirmation** to print confirmation.



67. You will be taken back to the Enrollment screen. Click to return to the previous screen. The Possible subsequent activities window will appear.

Possible subsequent activities

☒ Enrolled on 07/16/2009

Terminated on 07/15/2009

☐ Automatic Plans

☐ Default Plans

☐ All plans

Add. functions 07/27/2009

☐ Plan overview

☐ Enrollment Form

☐ Particip. Monitor

☒ ☒

68. Click  (Cancel) to cancel.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. 40000312

Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

From

Action Type	Personnel	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

69. You will be taken back to the Personnel Actions (PA40) screen. You have completed this transaction.

### Results

You have successfully transferred an active employee from one position to another position.

<b>Comments</b>
Once the Plan 3 employee has submitted their completed DRS member information form designating their Plan 3 contribution rate, see the OLQR procedure <a href="#">Retirement Plan Choice 90 day (New Hire)</a> , to complete the retirement choice.